

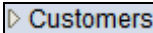



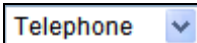

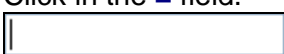
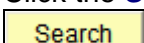


# Using Search Pages User Procedure

Statewide Management, Accounting and Reporting Tool



## Using Search Pages



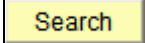


| Step | Action  |
|------|---|
| 1.   | Begin by navigating to the <b>General Information</b> search page.<br><br>Click the <b>Customers</b> link.<br>   |
| 2.   | Click the <b>Customer Information</b> link.<br>  |
| 3.   | Click the <b>General Information</b> link.<br>   |
| 4.   | There are two types of search pages: <b>Basic Search</b> and <b>Advanced Search</b> . When you select a page, SMART often displays the Advanced Search page, on the <b>Find an Existing Value</b> tab. You may also click the <b>Add a New Value</b> tab to add a new row of data into the table.<br><br>Click the <b>Basic Search</b> link.<br> |
| 5.   | With <b>Basic Search</b> , you have the option of changing your search criteria. The <b>Search By</b> drop-down list lets you select different search keys to search against the database. You can also enter full or partial values for the key field. For example, you may not know the telephone number, but you know the <b>SetID</b> for the customer.   |
| 6.   | Click the <b>Search by</b> drop-down list.<br>   |
| 7.   | Click the <b>SetID</b> item from the drop-down list.<br>   |
| 8.   | Click in the <b>=</b> field.<br>   |
| 9.   | Enter the desired information into the <b>=</b> field. The SetID of SOKID will default for tables that are shared across agencies.<br><br>For this simulation, enter a valid value e.g. " <b>17300</b> ".   |
| 10.  | <b>Basic Search</b> offers just one field by which you may perform your search. You designate which key field you want to search with by selecting a drop-down list item from the <b>Search By</b> drop-down list and entering criteria in the <b>=</b> field.<br><br>Click the <b>Search</b> button.<br>  |



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| Step | Action   |
|------|--|
| 11.  | A list of customers that use the <b>SetID</b> of <b>17300</b> are displayed in the <b>Search Results</b> list.   |
| 12.  | <p>To view the details for a customer in the <b>Search Results</b>, click the related <b>17300</b> link from the <b>SetID</b> column.</p> <p>For this simulation, click the <b>17300</b> link for the <b>Petro's</b> customer.</p>    |
| 13.  | The <b>General Information</b> component is displayed for the <b>Petro's</b> customer.   |
| 14.  | <p>Click the <b>General Information</b> link to go back to the <b>General Information</b> search page</p>   |
| 15.  | <p>The options on the <b>Advanced Search</b> page let you narrow your search by entering values for more than one type of criteria. The Advanced Search page contains several keys to search for your record.</p> <p>Always include at least one criterion for your search. You will receive an error message if you click the <b>Search</b> button without entering any criteria.</p> <p>For this simulation only, click the <b>Search</b> button without entering criteria to see the resulting error message.</p>  |
| 16.  | <p>Some search records have required fields for a search to be performed. For this simulation, the <b>SetID</b> field is required to perform a search.</p> <p>Click the <b>OK</b> button.</p>   |
| 17.  | <p>Click in the <b>SetID</b> field.</p>   |
| 18.  | <p>Enter the desired information into the <b>SetID</b> field.</p> <p>For this simulation, enter a valid value e.g. "<b>17300</b>".</p>   |

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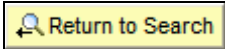
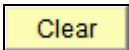
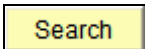
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| Step | Action  |
|------|---|
| 19.  | <p>The <b>Advanced Search</b> page defaults the <b>operators</b> used for each search key. Use operators to help narrow your searches. The following operators are used in SMART:</p> <ul style="list-style-type: none"> <li>• <b>begins with</b> – limits search results to only values that begin with the entered criteria</li> <li>• <b>contains</b> – limits search results to only values that contain the entered criteria</li> <li>• <b>=</b> – limits search results to only values that equal the entered criteria</li> <li>• <b>not=</b> – limits search results to only values that do not equal the entered criteria</li> <li>• <b>&lt;</b> – limits search results to only values that are less than the entered criteria</li> <li>• <b>&lt;=</b> – limits search results to only values that are less than or equal to the entered criteria</li> <li>• <b>&gt;</b> – limits search results to only values that are greater than the entered criteria</li> <li>• <b>&gt;=</b> – limits search results to only values that are greater than or equal to the entered criteria</li> <li>• <b>between</b> – limits search results to only values that are between the entered criteria</li> <li>• <b>in</b> – limits search results to only values that are in a list of items, separated by commas</li> </ul> <p>For this simulation, the default operator for all but one of the search keys is <b>begins with</b>. This means that the system will search for records that match based on the key beginning with the criteria entered in each field.</p> |
| 20.  | <p>For this simulation, you want to search for a customer from a range of <b>customer ID</b> values and you know the customer ID is somewhere between "0000050040" and "0000050060".</p> <p>You could use the <b>begins with</b> operator and enter "00000500". This would return all customers with customer IDs that start with "00000500". However, because you know the specific range of the customer ID, use the <b>between</b> operator to better limit your search results.</p> <p>Click the <b>Customer ID</b> drop-down list.</p>    |
| 21.  | <p>Click the <b>between</b> item from the drop-down list.</p>    |
| 22.  | <p>Notice a new field appears on the search page to let you enter the range of customer ID values. Use the first <b>Customer ID</b> field to enter the lower end of the range.</p> <p>Click in the <b>Customer ID</b> field.</p>   |
| 23.  | <p>Enter the desired information into the <b>Customer ID</b> field.</p> <p>For this simulation, enter a valid value e.g. "0000050040".</p>  |

| Step | Action   |
|------|--|
| 24.  | Use the second <b>Customer ID</b> field to enter the upper end of the range.<br><br>Click in the <b>Customer ID</b> field.<br><input type="text"/>   |
| 25.  | Enter the desired information into the <b>Customer ID</b> field.<br><br>For this simulation, enter a valid value e.g. " <b>0000050060</b> ".   |
| 26.  | Using an operator for more than one field helps to make your search even more specific. For this simulation, add an = operator for city equal to "Wichita".<br><br>Click the <b>City</b> drop-down list.<br><input type="text" value="begins with"/>   |
| 27.  | Click the = item from the drop-down list.<br><input type="text" value="="/>  |
| 28.  | Click in the <b>City</b> field.<br><input type="text"/>  |
| 29.  | Enter the desired information into the <b>City</b> field.<br><br>For this simulation, enter a valid value e.g. " <b>Wichita</b> ".   |
| 30.  | Click the <b>Search</b> button.<br><input type="button" value="Search"/>   |
| 31.  | Notice that only nine customers fall in the range of customer IDs and are in Wichita.  |
| 32.  | With <b>Advanced Search</b> , all the columns in the <b>Search Results</b> list are displayed as links. For this simulation, click one of the links for the customer named <b>Apex</b> .<br><br>Click the <b>Apex</b> customer.  |
| 33.  | The <b>General Information</b> component is displayed for the <b>Apex</b> customer. Notice that the key fields from the search page appear as display-only at the top of the page.   |
| 34.  | Click the right scrollbar.   |
| 35.  | <b>Search List Navigation</b> buttons are available to process your search. They are displayed below the transaction area of the page.   |
| 36.  | The <b>Return to Search</b> button returns you to the search page.   |
| 37.  | The <b>Previous in List</b> button displays the data for the previous data row in your search results. This button appears gray if: <ul style="list-style-type: none"> <li>• You did not select the data row from a list (such as <b>Search Results</b>)</li> <li>• There was only one row in the list</li> <li>• The data displayed is the first row of the list</li> </ul> |

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| Step | Action  |
|------|---|
| 38.  | <p>The <b>Next in List</b> button displays the data for the next data row in your search results. This button appears gray if:</p> <ul style="list-style-type: none"> <li>• You did not select the data row from a list (such as <b>Search Results</b>)</li> <li>• There was only one row in the list</li> <li>• The data displayed is the last row of the list</li> </ul>  |
| 39.  | <p>Click the <b>Return to Search</b> button.</p>   |
| 40.  | <p>Use the <b>Clear</b> button to remove all the criteria in the search fields when you want to enter new search criteria.</p> <p>Click the <b>Clear</b> button.</p>   |
| 41.  | <p>You can now enter your new search criteria.</p> <p>Click in the <b>SetID</b> field.</p> <input data-bbox="332 955 615 1003" type="text"/>  |
| 42.  | <p>Enter the desired information into the <b>SetID</b> field.</p> <p>For this simulation, enter a valid value e.g. "<b>17300</b>".</p>  |
| 43.  | <p>Click in the <b>Customer ID</b> field.</p> <input data-bbox="332 1165 615 1213" type="text"/>  |
| 44.  | <p>Sometimes, you may need to use a <b>wildcard</b> when searching for data in character fields. A wildcard is a special symbol that stands for one or more characters. SMART uses the <b>% (percent symbol)</b> wildcard to help you find the information you need. Use the % wildcard to match one or more characters.</p> <p>For this simulation, you know the customer ID begins with a "0" and ends with a "9". Use the % wildcard to help you find the customer.</p> <p><b>Note:</b> Wildcards only work with the <b>begins with</b> and <b>contains</b> operators.</p> |
| 45.  | <p>Enter the desired information into the <b>Customer ID</b> field.</p> <p>For this simulation, enter a valid value e.g. "<b>0%9</b>".</p>  |
| 46.  | <p>Click the <b>Search</b> button.</p>   |
| 47.  | <p>Notice the <b>Search Results</b> displays only customers whose customer ID begins with a "0" and ends with a "9".</p>  |
| 48.  | <p><b>Nice job!</b> You have successfully completed the <b>Using Search Pages</b> topic.</p> <p><b>End of Procedure.</b></p>  |



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